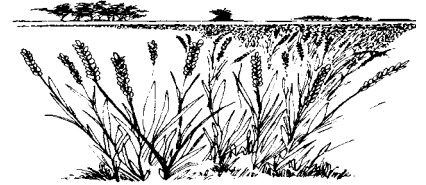


California Field Crop Review



Frequency: Monthly
Released: October 17, 2005

(USPS 598-270)
VOL. 26 NO. 10



USDA, National Agricultural Statistics Service,
California Field Office

HIGHLIGHTS IN THIS ISSUE:

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American Pima cotton production in California is forecast at 630 thousand bales, 8 percent below the previous year. There have been scattered problems with mites, and aphid infestation has been more widespread than in the last five years.

FIELD CROP ACREAGE, YIELD, AND PRODUCTION

COTTON: Upland cotton production in California is forecast at 1.20 million bales, 33 percent below last year. The yield is forecast at 1,330 pounds per acre, 14 percent below 2004. Cotton development continued lagging behind normal, but the entire crop was reported in fair to good condition. Toward the end of the month, the cooler temperatures allowed for defoliation to get underway. The crop looks better in northern areas of the San Joaquin Valley than in southern areas.

Upland cotton production in the U.S. is forecast at 22.0 million bales, 2 percent below 2004. The yields are expected to be 788 pounds per acre, 55 pounds below last year. Harvested acreage was up 5 percent from the previous year.

U.S. American Pima cotton production is forecast at 704 thousand bales, down 6 percent from 2004. The yield is forecast at 1,275 pounds per acre.

(Continued on Page 2.)

FIELD CROP ACREAGE, YIELD, AND PRODUCTION, CALIFORNIA AND UNITED STATES, 2004-05

| Crop | Area Harvested | | Yield Per Acre | | | Production | | |
|---------------------------------|----------------|------------------|----------------|----------|------------------|------------|-----------|------------------|
| | 2004 | 2005 Forecast | Unit | 2004 | 2005 Forecast | Unit | 2004 | 2005 Forecast |
| | Thousand Acres | | | | | | Thousands | |
| CALIFORNIA | | | | | | | | |
| Wheat, Winter | 320.0 | 290.0 | Tons | 2.55 | 2.16 | Tons | 816.0 | 626.4 |
| Wheat, Durum | 100.0 | 69.0 | Tons | 2.70 | 2.85 | Tons | 270.0 | 196.7 |
| Oats | 25.0 | 20.0 | Tons | 1.36 | 1.20 | Tons | 34.0 | 24.0 |
| Barley | 75.0 | 60.0 | Tons | 1.44 | 1.51 | Tons | 108.0 | 90.7 |
| Corn for Grain | 150.0 | 155.0 | Tons | 4.90 | 4.34 | Tons | 735.0 | 672.7 |
| Rice, All <u>1/</u> | 590.0 | 508.0 | Cwt. | 86.00 | 75.00 | Cwt. | 50,759.0 | 38,100.0 |
| Long | 7.0 | 9.0 | Cwt. | 73.00 | 2/ | Cwt. | 511.0 | 2/ |
| Medium | 535.0 | 447.0 | Cwt. | 88.00 | 2/ | Cwt. | 47,080.0 | 2/ |
| Short | 48.0 | 52.0 | Cwt. | 66.00 | 2/ | Cwt. | 3,168.0 | 2/ |
| Cotton, Upland <u>3/</u> | 557.0 | 433.0 | Lbs. | 1,543.00 | 1,330.00 | Bales | 1,790.0 | 1,200.0 |
| Cotton, American Pima <u>3/</u> | 214.0 | 226.0 | Lbs. | 1,532.00 | 1,338.00 | Bales | 683.0 | 630.0 |
| Sugar Beets <u>4/</u> | 49.1 | 45.3 | Tons | 39.30 | 38.00 | Tons | 1,930.0 | 1,721.0 |
| Beans, Dry Edible <u>5/</u> | 57.0 | 64.0 | Cwt. | 20.40 | 18.00 | Cwt. | 1,163.0 | 1,152.0 |
| Hay, All | 1,550.0 | 1,540.0 | Tons | 5.81 | 5.65 | Tons | 9,000.0 | 8,704.0 |
| Alfalfa Hay | 1,050.0 | 1,020.0 | Tons | 7.00 | 6.80 | Tons | 7,350.0 | 6,936.0 |
| Other Hay | 500.0 | 520.0 | Tons | 3.30 | 3.40 | Tons | 1,650.0 | 1,768.0 |
| UNITED STATES | | | | | | | | |
| Wheat, Winter | 34,462.0 | 33,680.0 | Tons | 1.31 | 1.33 | Tons | 44,983.0 | 44,813.1 |
| Wheat, Durum | 2,363.0 | 2,691.0 | Tons | 1.14 | 1.12 | Tons | 2,696.8 | 3,001.4 |
| Oats | 1,787.0 | 1,823.0 | Tons | 1.04 | 1.01 | Tons | 1,851.1 | 1,840.0 |
| Barley | 4,021.0 | 3,276.0 | Tons | 1.67 | 1.56 | Tons | 6,713.8 | 5,092.7 |
| Corn for Grain | 73,632.0 | 74,333.0 | Tons | 4.49 | 4.09 | Tons | 330,602.1 | 304,008.3 |
| Rice, All <u>1/</u> | 3,325.0 | 3,343.0 | Cwt. | 69.42 | 66.78 | Cwt. | 230,818.0 | 223,238.0 |
| Long <u>6/</u> | 2,571.0 | 2,727.0 | Cwt. | 65.69 | 2/ | Cwt. | 168,901.0 | 175,137.0 |
| Medium <u>6/</u> | 705.0 | 563.0 | Cwt. | 83.25 | 2/ | Cwt. | 58,689.0 | 44,638.0 |
| Short <u>6/</u> | 49.0 | 53.0 | Cwt. | 65.88 | 2/ | Cwt. | 3,228.0 | 3,463.0 |
| Cotton, Upland <u>3/</u> | 12,809.0 | 13,408.0 | Lbs. | 843.00 | 788.00 | Bales | 22,505.1 | 22,013.0 |
| Cotton, American Pima <u>3/</u> | 248.0 | 265.0 | Lbs. | 1,443.00 | 1,275.00 | Bales | 745.6 | 704.0 |
| Sugar Beets <u>4/</u> | 1,306.9 | 1,243.3 | Tons | 22.90 | 21.50 | Tons | 29,956.0 | 26,746.0 |
| Beans, Dry Edible <u>5/</u> | 1,219.3 | 1,522.1 | Cwt. | 14.60 | 17.15 | Cwt. | 17,799.0 | 26,109.0 |
| Hay, All | 61,916.0 | 61,723.0 | Tons | 2.55 | 2.48 | Tons | 157,774.0 | 152,871.0 |
| Alfalfa Hay | 21,707.0 | 22,118.0 | Tons | 3.47 | 3.43 | Tons | 75,383.0 | 75,940.0 |
| Other Hay | 40,209.0 | 39,605.0 | Tons | 2.05 | 1.94 | Tons | 82,391.0 | 76,931.0 |

^{1/} Sweet rice production included with short grain.

^{2/} To be released January 2006.

^{3/} Cotton yield in pounds; production in 480-pound net weight bales.

^{4/} Relates to year of intended harvest in all states, except California. In California, related to year of intended harvest for fall planted beets in central California and to year of planting for over-wintered beets in central and southern California.

^{5/} Excludes beans grown for garden seed.

^{6/} The 2005 rice production by class estimates are based on class harvested acreage estimates and the 5-year average class yield compared to the all rice yield.

FIELD CROP ACREAGE, YIELD, AND PRODUCTION (Continued from Page 1.)

RICE: California's 2005 rice crop forecast, at 38.1 million cwt., is 25 percent below 2004. The 508 thousand acres for harvest are 14 percent below the previous year. The yield is forecast at 7,500 pounds per acre, 13 percent below last year.

The 2005 U.S. rice production is forecast at 223 million cwt., down 3 percent from last year. The area for harvest is expected to total 3.34 million acres, up fractionally from a year ago. The yields are expected to average 6,678 pounds per acre, down 264 pounds from last year's record high yield.

HAY: Production of alfalfa hay in California is forecast 6 percent below last year's crop at 6.94 million tons. Other hay production is forecast at 1.77 million tons, up 7 percent from the previous year.

Nationally, alfalfa hay production is forecast at 75.9 million tons, up 1 percent from 2004. Other hay production is forecast at 76.9 million tons, 7 percent below last year's production.

SUGAR BEETS: California sugar beet production is forecast at 1.72 million tons, down 11 percent from the 2004 crop. Acreage for harvest is forecast at 45.3 thousand acres, and yields are expected to be 3 percent less than last year.

The U.S. sugar beet production is forecast at 26.7 million tons, 11 percent below last year's production. Harvested acreage is 5 percent below last year, and expected yields are 1.4 tons below the previous year.

CORN: California's 2005 corn for grain production is expected to total 673 thousand tons, 8 percent below last year. Acreage for harvest, at 155 thousand acres, is 3 percent above last year. The forecast yield, at 4.34 tons per acre, is down 11 percent from a year earlier.

The U.S. corn for grain production is forecast at 304 million tons, 8 percent below 2004. The average yield is forecast at 4.09 tons, 9 percent below last year.

DRY BEANS: California's 2005 all dry bean production is forecast at 1.15 million cwt., 1 percent below the 2004 crop. The 64.0 thousand acres for harvest are 12 percent above last year. The forecast yield of 1,800 pounds per acre is 12 percent below the 2004 yield.

The U.S. dry edible bean production is forecast at 26.1 million cwt., up 47 percent from a year earlier. Harvested acreage is up 25 percent, and average yields are 17 percent above last year.

WINTER WHEAT: California's final 2005 winter wheat production is estimated at 626 thousand tons. Average yields came in at 2.16 tons per acre, 15 percent below the previous year. Harvested acreage was estimated at 290 thousand acres, 9 percent below last year.

The U.S. winter wheat production is estimated at 44.8 million tons, fractionally below the 2004 crop. The yield, at 1.33 tons per acre, is 2 percent above last year's final yield.

BARLEY: California's final 2005 barley production, estimated at 90.7 thousand tons, was 16 percent below last year. The average yield of 1.51 tons per acre was 5 percent above 2004. Acreage harvested for grain was estimated at 60.0 thousand acres, 20 percent below 2004.

The U.S. barley production is estimated at 5.09 million tons, down 24 percent from last year's output. The average yield is forecast at 1.56 tons per acre, 7 percent below last year.

SEPTEMBER 1 GRAIN STOCKS

U.S. wheat stocks totaled 57.6 tons, 1 percent below the 58.2 million tons on hand September 1, 2004. U.S. total oat stocks, at 1.81 million tons, were 2 percent below the 1.85 million tons stored last year. U.S. barley stocks totaled 6.03 million tons, 13 percent below the 6.96 million tons of stock a year earlier. U.S. total stocks of corn were 59.1 million tons, 120 percent above the 26.8 million tons on hand September 1, 2004. U.S. grain sorghum stocks totaled 1.60 million tons, 70 percent above the 939 thousand tons on hand a year earlier.

GRAIN STOCKS IN ALL POSITIONS, UNITED STATES (Includes stocks under support & government owned grain.)

| Grain and Position 1/ | Sept. 1, 2004 | June 1, 2005 | Sept. 1, 2005 |
|-----------------------|---------------|--------------|---------------|
| | Tons | | |
| Wheat, All | 58,152,210 | 16,203,000 | 57,559,020 |
| Corn | 26,826,548 | 120,953,896 | 59,142,552 |
| Barley | 6,961,848 | 3,082,008 | 6,031,464 |
| Oats | 1,852,128 | 927,072 | 1,808,688 |
| Sorghum Grain | 939,372 | 3,168,760 | 1,596,196 |

1/ Includes stocks at mills, elevators, warehouses, terminals, and processors.



WINTER POTATO **ACREAGE, YIELD, AND PRODUCTION, 2004-05 1/**

| State and U.S. | Acreage | | | | Yield | | Production | |
|----------------|-------------|------|-----------|------|-------|------|------------|-------|
| | Planted | | Harvested | | | | | |
| | 2004 | 2005 | 2004 | 2005 | 2004 | 2005 | 2004 | 2005 |
| | 1,000 Acres | | | | Cwt. | | 1,000 Cwt. | |
| CA | 13.0 | 14.0 | 13.0 | 14.0 | 250 | 250 | 3,250 | 3,500 |
| FL | 5.7 | 6.0 | 5.5 | 5.8 | 285 | 240 | 1,568 | 1,392 |
| U.S. | 18.7 | 20.0 | 18.5 | 19.8 | 260 | 247 | 4,818 | 4,892 |

1/ Revised data for 2005.

PRICES RECEIVED BY CALIFORNIA FARMERS - SEPTEMBER 2005

Prices received by California farmers at mid-September were above August for all hay and alfalfa hay. The mid-September price for wheat, barley, dry edible beans, and Upland cotton lint were not published to avoid possible disclosure of individual buyers. Sales were too insufficient to establish a mid-month price for oats and cottonseed. Prices were above a year earlier for all potatoes, summer potatoes, all hay and alfalfa hay. Prices remained the same as the previous year for hay other than alfalfa.

U.S. PRICES RECEIVED INDEX DOWN ONE POINT

The preliminary All Farm Products Index of Prices Received by Farmers in September, at 116, based on 1990-92=100, decreased 1 point (0.9 percent) from August. The Crop Index is down 5 points (4.3 percent) but the Livestock Index increased 4 points (3.4 percent). Producers received lower commodity prices for corn, soybeans, hogs, onions, and potatoes. Higher prices were received for cattle, eggs, broilers, sweet corn, and tomatoes. The overall index is also affected by the seasonal change based on a 3-year average mix of commodities producers sell. Decreased average marketings of cattle, broilers, grapes, wheat, and dairy offset increased marketings of soybeans, peanuts, potatoes, corn, and apples.

Preliminary All Farm Products Index is unchanged from September 2004. The Food Commodities Index, at 121, increased 1 point (0.8 percent) from last month and 2 points (1.7 percent) from September 2004.

The September All Crops Index is 111, down 4.3 percent from August and 1.8 percent below September 2004. From August, Index decreases for oil-bearing crops, feed grains & hay, and potatoes & dry beans more than offset the Index increases for cotton, vegetables, and fruit.

The September Food Grains Index, at 110, is 1.9 percent above the previous month, but 3.5 percent below a year ago. The September all wheat price, at \$111.33 per ton, is up \$3.33 from August, but down 67 cents from September 2004.

The September Feed Grains & Hay Index is 89, down 11 percent from last month and 12 percent below a year ago. The corn price, at \$61.79 per ton, is down \$7.85 from last month and \$16.78 below September 2004. The all hay price, at \$99.00 per ton, is down 70 cents from August, but up \$7.60 from last September. Grain sorghum, at \$3.13 per cwt., is 56 cents below August and down 44 cents from September last year.

The September Cotton Index, at 78, is up 13 percent from August but 3.7 percent below last year. The September price, at 47.4 cents per pound, is up 5.3 cents from the previous month, but 1.9 cents below last September.

Potatoes & Dry Beans The September Index, at 109, is down 6.8 percent from last month, but 12 percent above September 2004. The all potato price, at \$6.40 per cwt., is down 44 cents from August, but up \$1.08 from last September. The all dry bean price, at \$20.20 per cwt., is down \$1.10 from the previous month and \$2.70 from September 2004.

AVERAGE FARM PRICES RECEIVED BY FARMERS, CALIFORNIA AND UNITED STATES 1/

| Commodity | Unit | CALIFORNIA | | | UNITED STATES | | |
|------------------------------|------|------------|-------------|----------------|---------------|-------------|----------------|
| | | Sept. 2004 | August 2005 | Sept. 15, 2005 | Sept. 2004 | August 2005 | Sept. 15, 2005 |
| | | Dollars | | | | | |
| Corn <u>2/</u> | Tons | --- | --- | --- | 78.57 | 69.64 | 61.79 |
| Wheat <u>2/</u> | Tons | <u>3/</u> | <u>3/</u> | <u>3/</u> | 112.00 | 108.00 | 111.33 |
| Oats <u>2/</u> | Tons | --- | <u>3/</u> | <u>4/</u> | 88.75 | 91.88 | 96.25 |
| Barley <u>2/</u> | Tons | <u>3/</u> | 95.00 | <u>3/</u> | 101.25 | 105.00 | 108.33 |
| Sorghum Grain <u>2/</u> | Cwt. | --- | --- | --- | 3.57 | 3.69 | 3.13 |
| Rice <u>2/</u> | Cwt. | --- | --- | --- | 8.47 | 6.54 | 6.65 |
| Dry Edible Beans <u>2/</u> | Cwt. | 35.80 | <u>3/</u> | <u>3/</u> | 22.90 | 21.30 | 20.20 |
| All Potatoes <u>5/</u> | Cwt. | 15.00 | 18.60 | 18.40 | 5.32 | 6.84 | 6.40 |
| Winter | Cwt. | --- | --- | --- | --- | --- | --- |
| Spring | Cwt. | --- | --- | --- | --- | --- | --- |
| Summer | Cwt. | 15.00 | 18.60 | 18.40 | --- | --- | --- |
| Fall | Cwt. | --- | --- | --- | --- | --- | --- |
| All Hay, Baled <u>2/</u> | Tons | 110.00 | 126.00 | 127.00 | 91.40 | 99.70 | 99.00 |
| Alfalfa Hay, Baled <u>2/</u> | Tons | 113.00 | 131.00 | 132.00 | 97.50 | 109.00 | 107.00 |
| Other Hay, Baled <u>2/</u> | Tons | 96.00 | 100.00 | 96.00 | 74.30 | 74.80 | 74.60 |
| Upland Cotton Lint <u>2/</u> | Lbs. | <u>3/</u> | <u>3/</u> | <u>3/</u> | 0.493 | 0.421 | 0.474 |
| Cottonseed | Tons | --- | <u>4/</u> | <u>4/</u> | 89.00 | 102.00 | 96.00 |

1/ The estimated prices shown in the table represent composite average prices received by farmers. They are averages for all grades, classes, and methods of sale of each commodity for the State and U.S. as a whole.

2/ Previous month revised to monthly average.

3/ Not published to avoid disclosure of individual operations.

4/ Insufficient data to establish a price.

5/ Monthly average.

INDEX NUMBER OF PRICES RECEIVED AND PRICES PAID BY FARMERS, UNITED STATES

| Index | 1910-14 = 100 | | | 1990-92 = 100 | | |
|---|---------------|-----------|------------|---------------|-----------|------------|
| | Sept. 2004 | Aug. 2005 | Sept. 2005 | Sept. 2004 | Aug. 2005 | Sept. 2005 |
| Prices Received | | | | | | |
| All Farm Products | 735 | 742 1/ | 766 | 116 | 117 | 116 |
| All Crops | 560 | 573 1/ | 573 | 113 | 116 | 111 |
| Food Grains | 364 | 342 1/ | 350 | 114 | 108 1/ | 110 |
| Feed Grains and Hay | 362 | 357 1/ | 317 | 101 | 100 1/ | 89 |
| Cotton | 417 | 356 1/ | 401 | 81 | 69 1/ | 78 |
| Potatoes and Dry Edible Beans | 492 | 591 1/ | 553 | 97 | 117 1/ | 109 |
| Prices Paid by Farmers for Commodities, | | | | | | |
| Services, Interest, Taxes and Wage Rates 2/ | 1,797 | 1,874 1/ | 1,887 | 135 | 141 | 142 |
| Parity Ratio 3/ | 41 | 40 1/ | 41 | 86 | 83 | 82 |

1/ Revised.

2/ All production indexes as of 15th of month.

3/ Ratio of Index of Prices Received by Farmers to Index of Prices Paid, Interest, Taxes and Farm Wage Rates.

CASH INCOME BY COMMODITY GROUPS, CALIFORNIA, 2002-04

| Source of Income | 2002 | 2003 | 2004 |
|------------------------|-----------|-----------|-----------|
| | \$1,000 | | |
| FIELD CROPS | | | |
| Alfalfa Seed | 17,986 | 11,442 | 35,300 |
| Barley | 10,562 | 8,685 | 9,768 |
| Beans, Dry | 50,864 | 57,352 | 50,425 |
| Corn for Grain | 57,779 | 52,602 | 56,581 |
| Cotton Lint | 516,203 | 835,013 | 666,510 |
| Cottonseed | 81,972 | 88,853 | 106,201 |
| Grain, Sorghum | 1,899 | 2,314 | 2,409 |
| Hay, All | 559,970 | 529,118 | 603,344 |
| Oats | 4,068 | 3,917 | 3,015 |
| Oil Crops | 18,906 | 27,799 | 23,636 |
| Potatoes (Excl. Sweet) | 267,166 | 222,216 | 217,782 |
| Potatoes, Sweet | 67,267 | 80,892 | 79,057 |
| Rice | 227,027 | 311,794 | 329,317 |
| Sugar Beets | 77,224 | 77,381 | 77,381 |
| Wheat | 129,890 | 105,253 | 133,507 |
| Other Seed Crops | 157,073 | 138,372 | 136,434 |
| Other Field Crops | 418,564 | 411,769 | 399,790 |
| TOTAL | 2,664,420 | 2,964,772 | 2,930,457 |

| Source of Income | 2002 | 2003 | 2004 |
|--------------------------------------|------------|------------|------------|
| | \$1,000 | | |
| VEGETABLE CROPS | 6,585,731 | 7,426,022 | 7,285,918 |
| FRUIT AND NUT CROPS | 7,769,126 | 8,034,604 | 9,667,524 |
| LIVESTOCK, POULTRY AND PRODUCTS | 6,270,214 | 7,043,175 | 8,623,140 |
| NURSERY, GREENHOUSE AND FLORICULTURE | 3,310,099 | 3,449,943 | 3,318,247 |
| CHRISTMAS TREES | 9,662 | 7,975 | 9,900 |
| TOTAL CASH INCOME FROM MARKETINGS | 26,609,252 | 28,926,491 | 31,835,185 |
| FARM RELATED INCOME <u>1/</u> | 1,719,739 | 1,254,908 | 2,430,662 |
| GROSS CASH INCOME FROM FARMING | 28,328,991 | 30,181,399 | 34,265,847 |

^{1/} Includes value of home consumption, value of inventory adjustments, machine hire and custom work, forest products sold, rental value of farm dwelling, government payments, and other miscellaneous farm income.

Source: USDA Economic Research Service